

Step By Step Guide - Training for Brokers

2022-2023





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Introduction & Overview

This document provides Brokers who are seeking authorization with Maryland Health Benefit Exchange a step by step guide for accessing The MHBE Portal for CAW Registration & Application to complete the required training for the 2022-2023 plan year. Follow these instructions in order to fulfill your training obligations and ensure that you are able to assist your clients with their enrollments.

Major Training Milestones for the 2022-2023 Open Enrollment Period

Accessing the required training for Brokers seeking authorization can be described in three major steps:

1. Create a The MHBE Portal for CAW Registration & Application and Complete Broker Application specific to your broker role.
2. Once your application has been approved; you will have access to your training applicable to your broker role.
3. Complete the required online training for OE 2022-2023 (See Chart below). Required training must be completed within in 45 days once your application is approved.

OE 2022-2023 Training Requirement Chart

Open Enrollment Training Requirement Chart (X=Required)						
Course	New Broker: Individual and SHOP	New Broker: Individual Only	New Broker: SHOP Only	Returning Broker: Individual and SHOP	Returning Broker: Individual Only	Returning Broker: SHOP Only
2022 Pre-Authorization Training Curriculum	x	x	x	n/a	n/a	n/a
2022 Annual Training Curriculum	n/a	n/a	n/a	x	x	x
Consumer Portal System Learning Resources	x	x	x	optional	optional	optional
Small Biz Direct Enrollment Webinar	optional	n/a	optional	n/a	n/a	n/a

Step By Step Instructions

MHBE Training Account Creation/Application

Account Creation

1 Go to <https://mhbe.force.com/training/CustomCommunityLogin>

Click on the **Register** link.

Note: If you already have a MHBE Portal for CAW Registration & Application Account, skip to page 8.



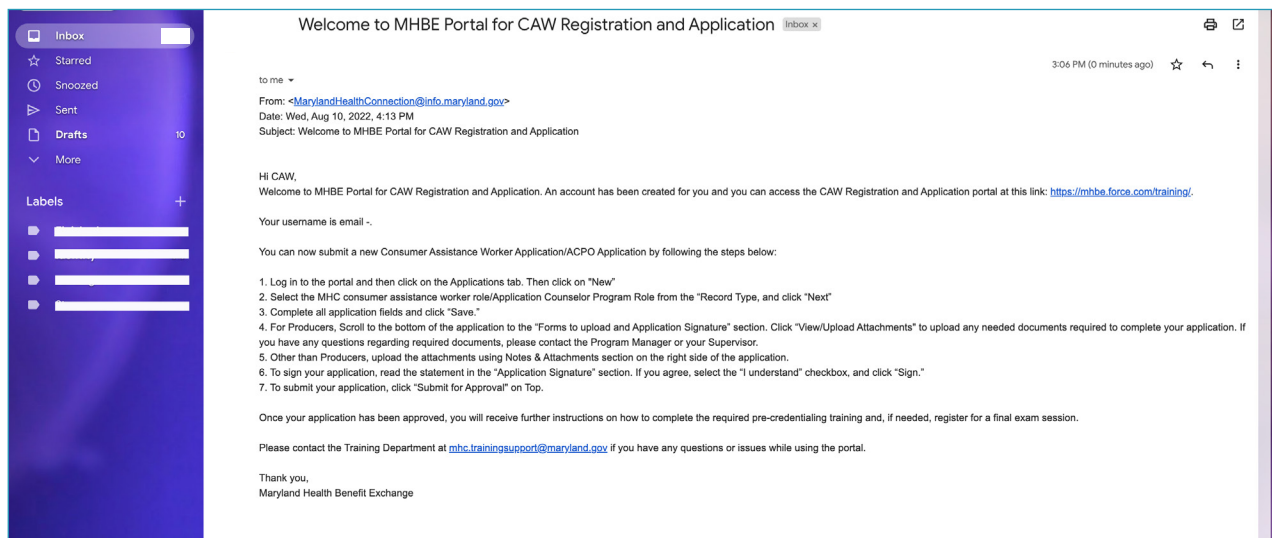
2 Complete the registration form by entering your First Name, Last Name, Email, and create a password. Passwords should be at least 10 characters long and a mix of characters and numbers.

Click the **Submit** button.

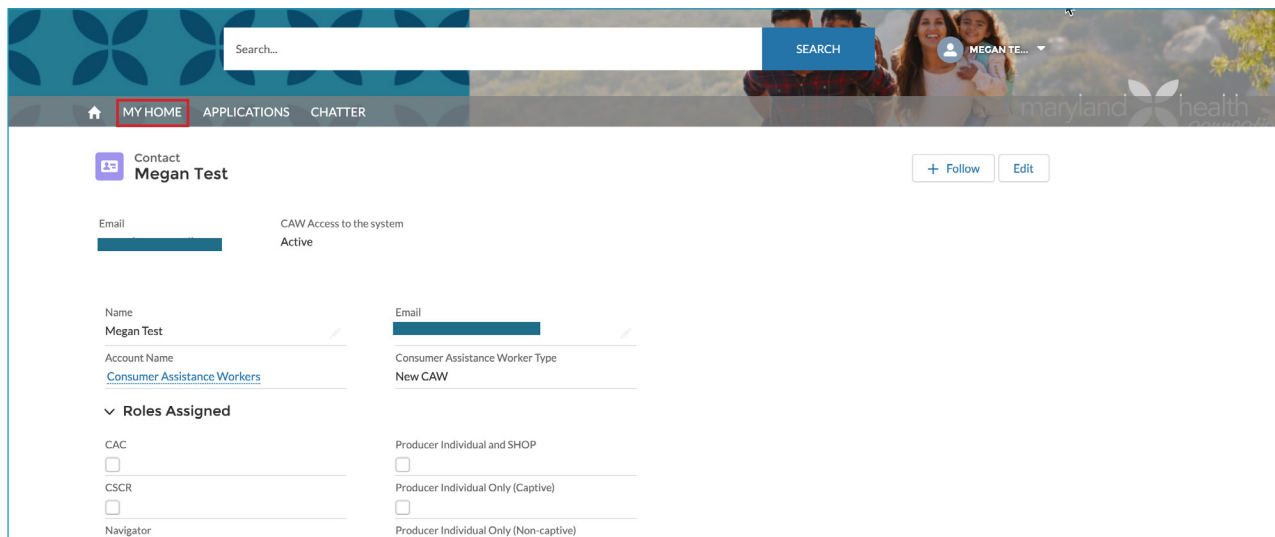


3 You will receive a confirmation email with the subject "Welcome to the MHBE Portal for CAW Registration & Application." The email contains the MHBE Training Portal link: <https://mhbe.force.com/training/CustomCommunityLogin> so that you can complete and submit an application.

Click on the link provided in the confirmation email and enter the login credentials you created during registration.



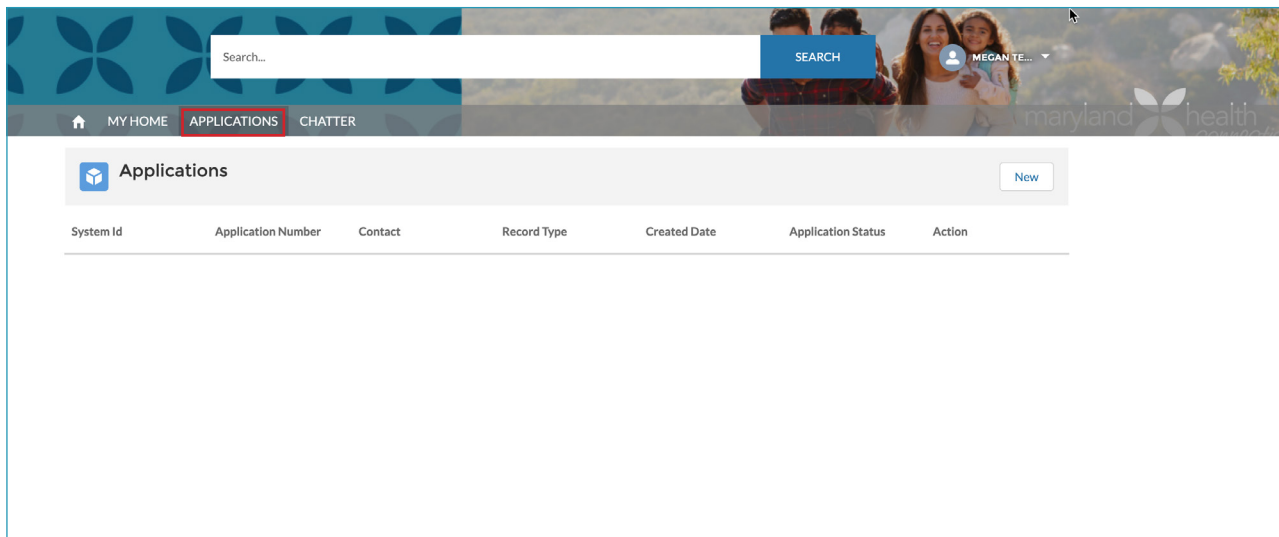
4 Click on the **Home Tab**. This shows an overview of the information you entered when creating an account as well as any roles that were approved and assigned to your account.



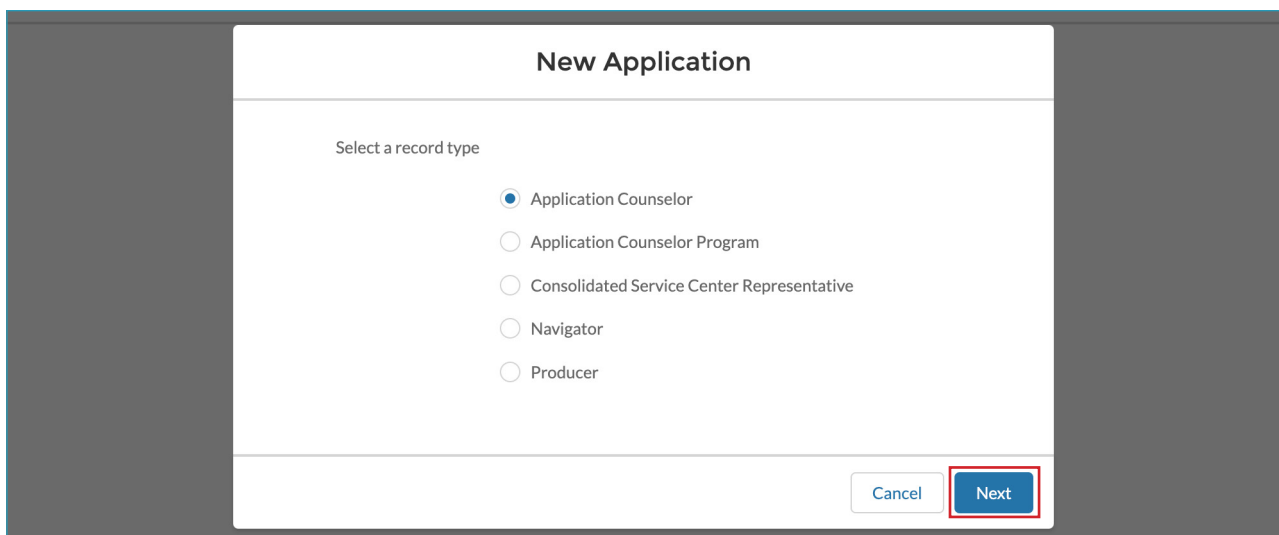
Application

1 Click on the **Applications** tab.

Click on the **Create New Application** button.



2 Select "Producer" from the options menu and click **Next**.



3**Enter requested information into the application fields:**

- Company/Agency Name – this appears on the website
- Company Agency Website – this appears on the website
- Languages spoken other than English – this will appear on the website
- Do you want your info to appear in search? – the default is yes. If unchecked, you will not appear in the Find Assistance search
- Assistance Offered Email – this will appear on the website
- Assistance Offered in Person – this will appear on the website
- Assistance Offered Phone – this will appear on the website
- National Producer Number – ensure this number matches your license
- Maryland Insurance License Number – ensure this number matches your license
- Authorization for Individual Exchange? – this is to individual insurance to Maryland residents
- Seeking Authorization for SHOP Exchange – this is to sell group insurance to small businesses
- Are you a Captive Producer? – this is only if you work directly with one carrier
- What Connector Entity Region do you work? (What region do you primarily work with?) – this is used by Connector Entities to refer consumers to brokers

Enter your Address Information:

- Please be sure to choose the correct state if you do not reside in MD.
- If your Mailing address is not the same as your business address, type your address in the Mailing Address fields.
- If your Mailing address is the same as your business address, check the box.

Enter your Contact Information:

- Work Phone – this will appear on the website
- If you will be using a different phone number for MFA, type the cell phone number in the MFA Cell Phone field
- If you are using your work cell phone for MFA, check the box
- Business Email – this will appear on the website
- If you will be using a different email address for MFA, type the email address in the MFA Email Address field
- If you are using your business email address for MFA, check the box

4

Please review the entire application. You can upload any requested information or supporting documentation by looking to the right hand side of your screen and choosing **Notes and Attachments**. If you are not ready to submit the application, you will be able to log out and come back to edit any information before submitting for approval.

View / Upload Attachments			
Upload Attachments			
Select Type	Select Attachment Type	Choose File	No file chosen
Action	L & O Alteration NEEA MD License	Status	Expiration Date
			Valid Till

Brokers will need to download the Non-Exchange Entity Agreement (NEEA) and the Attestation. Instructions to complete these documents:

Attestation should be completed as follows:


- On the last page, check the box, print your name and NPN, then sign your name and enter the date of signature.

NEEA should be completed as follows:

- Page 1 - print your name
- Page 10 - print your address, name, phone number, and email address
- Page 12 - On the right side, under Non-Exchange Entity:
- By: Sign your name
- Name: Print your name
- Title: Print your title
- Date: Print date of signature

- 5** Once your application is ready for submission with all requested supporting documentation, you must complete an Application Signature. Please read, click the check box next to “I understand”, and click the **Sign** button.

Application Signature

 Please click on the checkbox below to indicate that you agree to the terms and click on Sign button. Click on Submit for approval after you have signed the application.

Before submitting your application, please follow the below instructions to upload the required forms:

- Click on the "attestations" form name to download the form.
- Print out the form, fill it out, and sign where required. Electronic signatures are permitted.
- Have your employer sign where required.
- Upload a scanned copy of the form in PDF format in the "Upload attachments" section of the application (on the right). Give the original form to your manager for filing with your employee file.

Individual Application Counselor Attestation


By checking the box, I am indicating my consent to electronically sign this application and warrant that all of the information I have provided is true, complete, and accurate. I agree to update any change of address, phone or email within 30 days of the change. I have read, understand, and will attest to the Attestations for the type of position for which I am applying. I understand that I will be required to abide by all applicable state and federal regulations.

I Understand

Sign

- 6** Once you have done this, you will see notification that your application is ready to submit.

Application Signature

 You can submit for Approval

Before submitting your application, please follow the below instructions to upload the required forms:

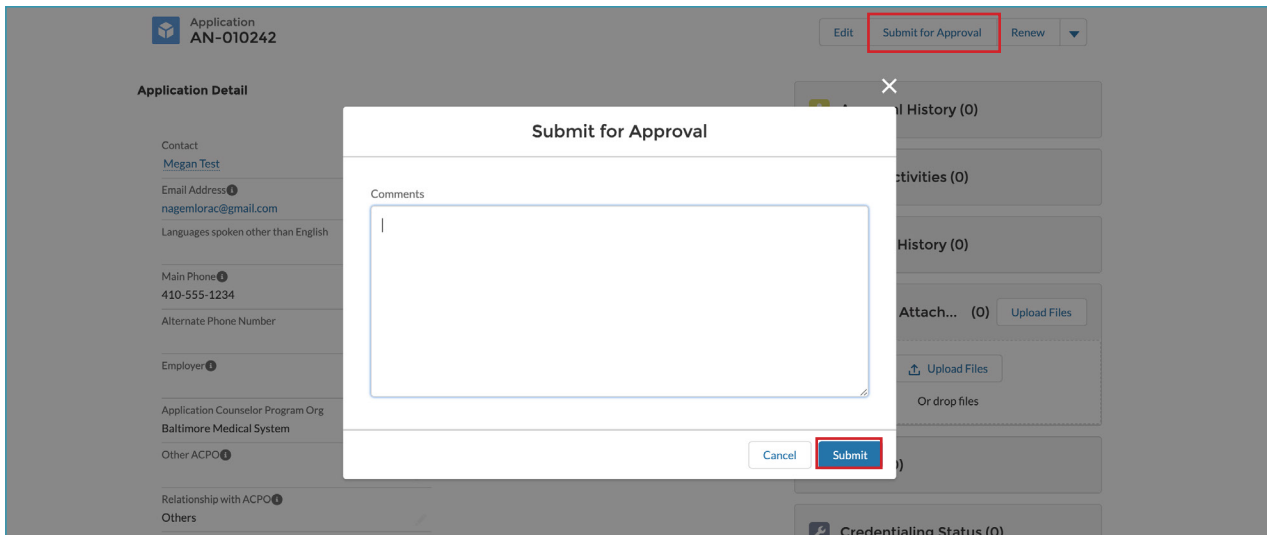
- Click on the "attestations" form name to download the form.
- Print out the form, fill it out, and sign where required. Electronic signatures are permitted.
- Have your employer sign where required.
- Upload a scanned copy of the form in PDF format in the "Upload attachments" section of the application (on the right). Give the original form to your manager for filing with your employee file.

Individual Application Counselor Attestation

By checking the box, I am indicating my consent to electronically sign this application and warrant that all of the information I have provided is true, complete, and accurate. I agree to update any change of address, phone or email within 30 days of the change. I have read, understand, and will attest to the Attestations for the type of position for which I am applying. I understand that I will be required to abide by all applicable state and federal regulations.

I Understand

- Submit the application for approval by clicking **Submit for Approval**. This button is located at the top right of your application. A small window will appear. Add any comments, and then click **Submit**.

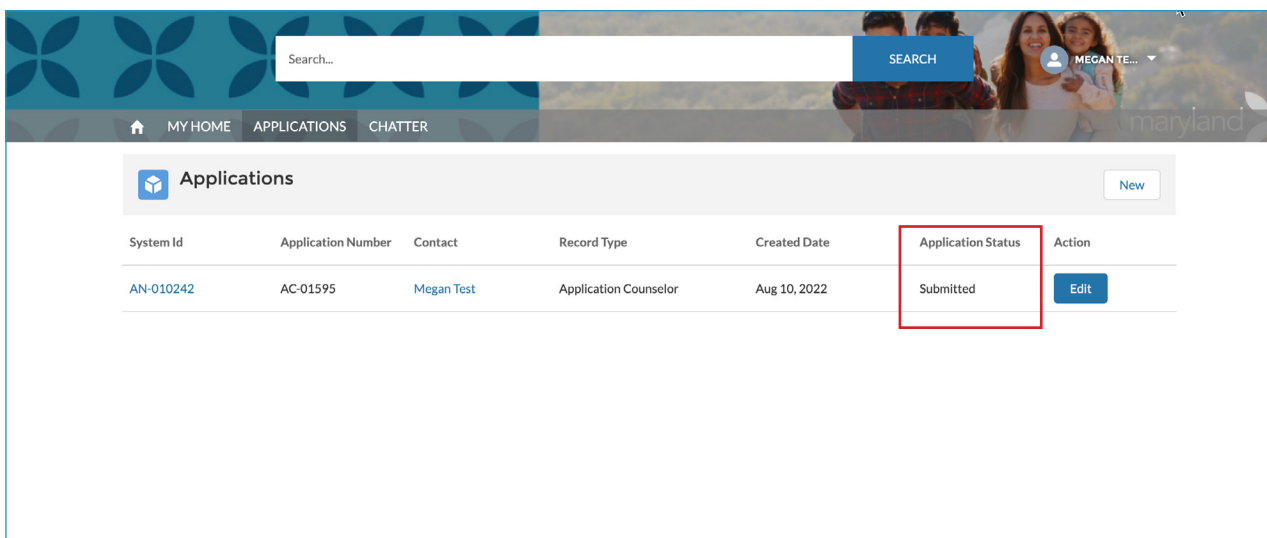


After Application Submission

- After you have submitted your application, it will appear in your applications tab as “submitted.” You will receive a confirmation email regarding the approval of your application.

Once the application is approved, you should look for a communication from MHC Training Support Team inviting you to create an account and login. You will receive this email within 3-5 business days after receiving application approval. CACs & Brokers should also expect an email from their Program Manager.

Note: You will not be granted access to training with the LMS without an approved application.



ADOBE LEARNING MANAGER

Account Creation

- 1 Adobe accounts that have been created with your work email (IE, maryland.gov or other official email domains) are acceptable to use for your training profile.




In addition, please make note as you create your account that your password must:

- Include at least one number or symbol
- Include both upper and lower case Latin characters
- Be at least 8 characters long.

Create an account

Already have an account? [Sign in](#)

Sign up with social


  


Or

Sign up with email

Email address



First name Last name

Password 

Date of birth 

Month Year

January

 [United States](#) 

By clicking Create account, I agree that:

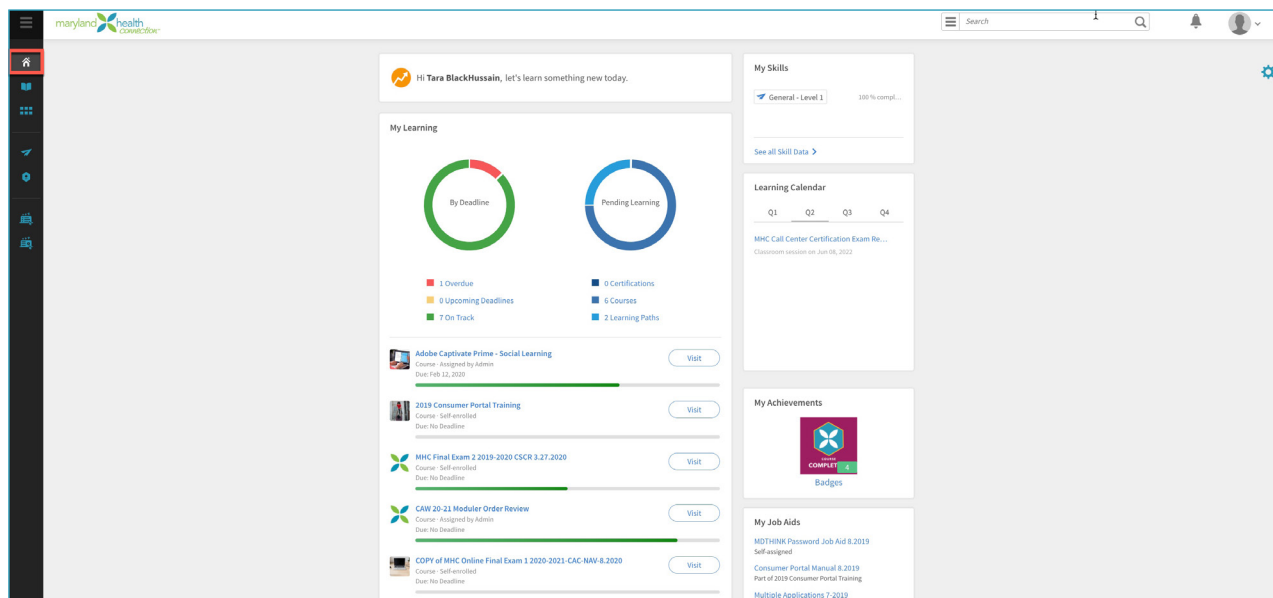
- I have read and accepted the [Terms of Use](#).
- The [Adobe family of companies](#) may keep me informed with [personalized](#) emails about products and services.

See our [Privacy Policy](#) for more details or to opt-out at any time.

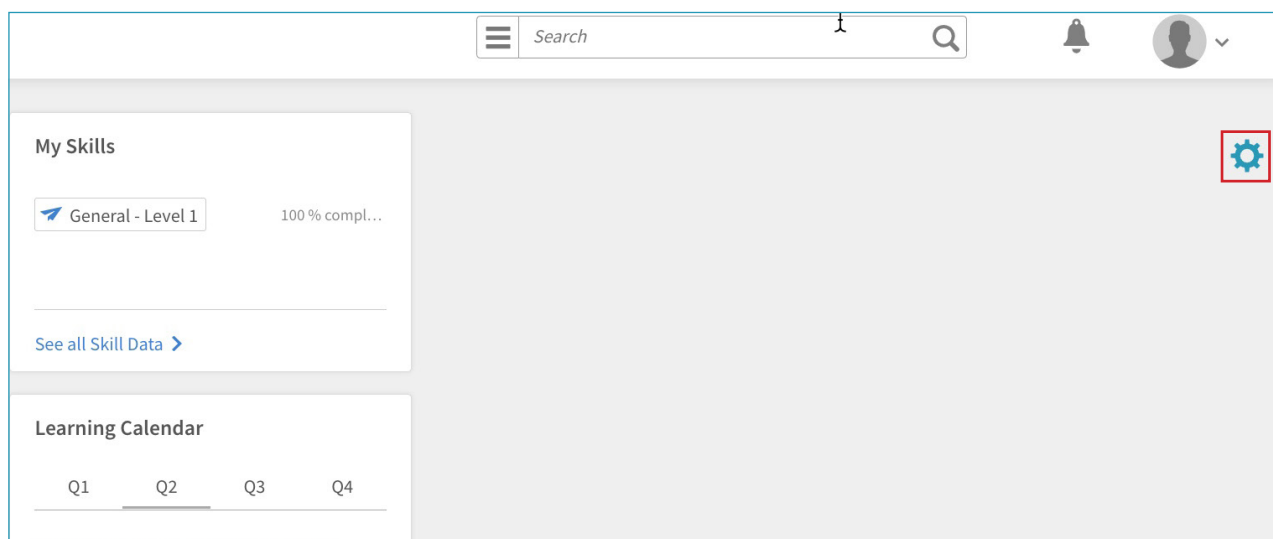
[Create account](#)

Navigating the Learner Dashboard

1 Upon opening Adobe Learning Manager, you will see your dashboard.

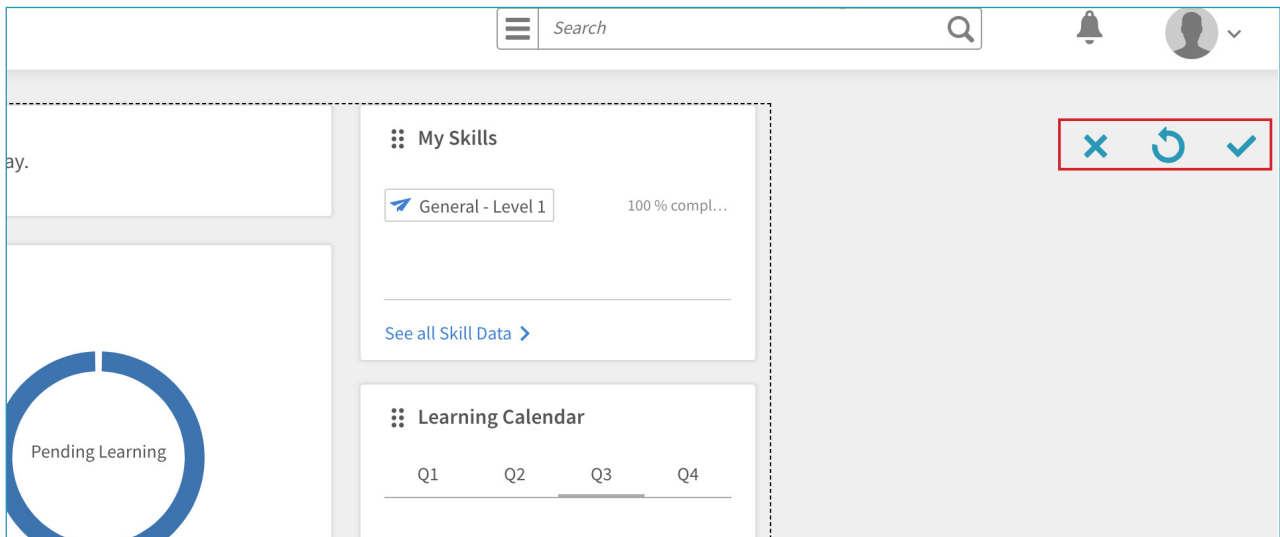


2 The Dashboard helps you organize your training. It can be customized clicking the gear button in the upper right corner.



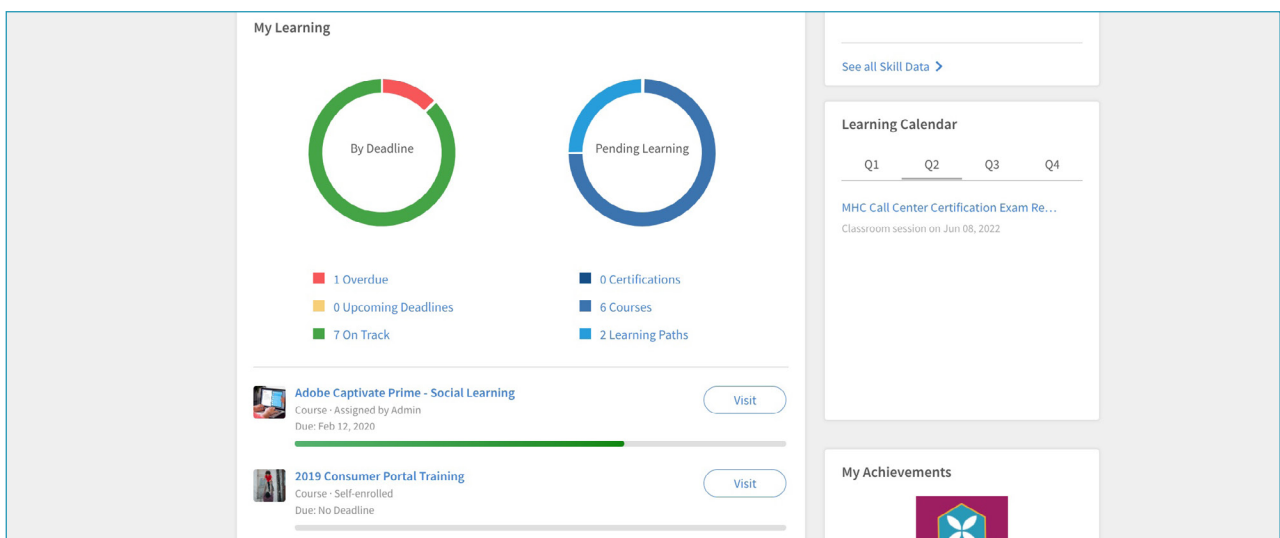
- 3** When you click on the gear button, a dotted line will appear around your profile. Once it does, you can drag and drop the “widgets” (pieces of your profile) around within that space to organize them the way you prefer.

You may return to the top right of your screen to save your changes, reset your dashboard to its prior layout, or cancel the changes you have made.



- 4** The “By Deadline” donut on your screen lets you know about training that’s overdue (in red) or nearing a deadline (in yellow). The “Pending Learning” donut on your screen uses shades of blue to let you know about courses and learning programs that have been assigned to you.

You can launch any of those trainings from the list directly below the donuts. Note that this area contains only training that you are ALREADY enrolled in. If you want to find any other training or job aids available to you, you will use the catalog tab to enroll in training courses and view job aids. You will also find a recommended learning box below the list of assigned trainings.



5 To the right of the donuts, you will find a calendar of your learnings assignments. It is divided by quarter.

The screenshot displays a learning dashboard. On the left, there are two donut charts. The first, titled 'By Deadline', is mostly green with a small red segment. The second, titled 'Pending Learning', is mostly blue with a small dark blue segment. Below these charts are two columns of statistics:

- 1 Overdue (red square)
- 0 Upcoming Deadlines (yellow square)
- 7 On Track (green square)
- 0 Certifications (dark blue square)
- 6 Courses (medium blue square)
- 2 Learning Paths (light blue square)

Below the statistics is a card for 'Social Learning' with a 'Visit' button. To the right is a 'Learning Calendar' widget with tabs for Q1, Q2, Q3, and Q4. The Q2 tab is selected, showing an entry for 'MHC Call Center Certification Exam Re...' with a classroom session on Jun 08, 2022.

6 Beneath your calendar and across from your recommended training list, you will see the Job Aids widget. This is where you will find any job aids assigned to you.

The screenshot shows a recommended training list on the left and a 'My Job Aids' widget on the right. The training list includes:

- '20-21 Moduler Order Review' (Assigned by Admin, Deadline) with a 'Visit' button.
- 'of MHC Online Final Exam 1 2020-2021-CAC-NAV-8.2020' (Self-enrolled, Deadline) with a 'Visit' button.
- 'er Training Videos-United Healthcare (UHC) 20-21' (Self-enrolled, Deadline) with a 'Visit' button.
- 'RED: Call Center Training & Certification Exam' (Learning Path, Self-enrolled, Deadline) with a 'Visit' button.

The 'My Job Aids' widget on the right lists:

- MDTHINK Password Job Aid 8.2019 (Self-assigned)
- Consumer Portal Manual 8.2019 (Part of 2019 Consumer Portal Training)
- Multiple Applications 7-2019 (Self-assigned)
- Pre-Credentialing Policy Training Manual 201' (Part of Pre-Credentialing Webinar Recording 10.20...)

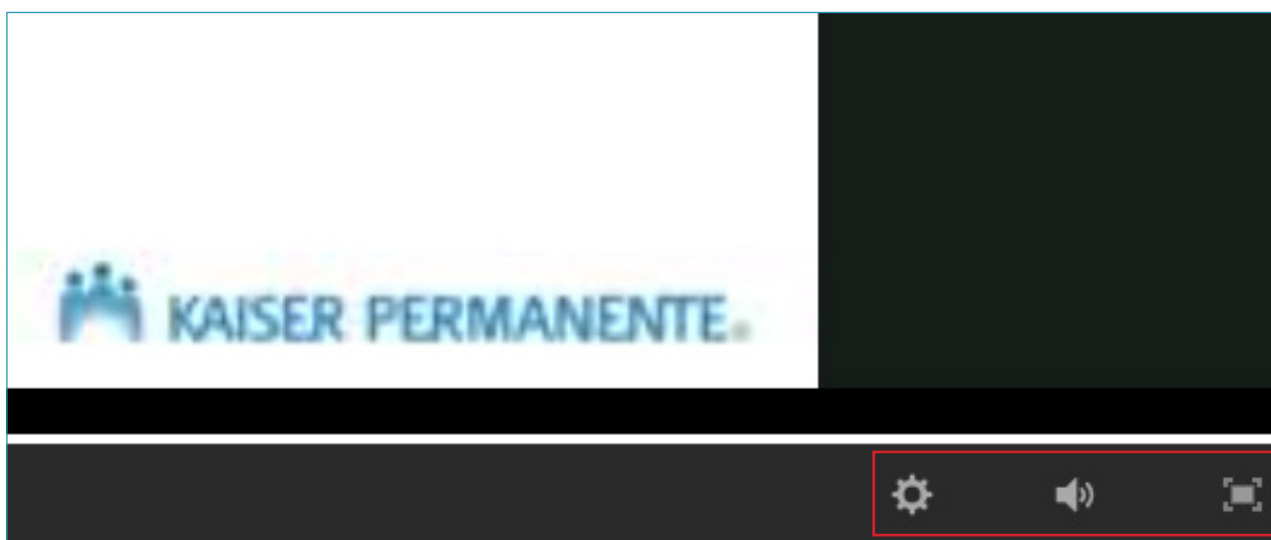
A 'See all Job Aids >' link is at the bottom of the widget.

Using the Player

- 1 Once you start a course, it will appear in the player. This player adapts to fit different kind of content. It will also automatically guide you through all elements of your courses.



- 2 Once you enter the player, the settings gear, volume, and full screen buttons will be at bottom right.



- 3 To the bottom left of your player, you will see the notebook button. This button gives access to your Notes panel, where you can type notes and Adobe Learning Manager (ALM) will save them for you.



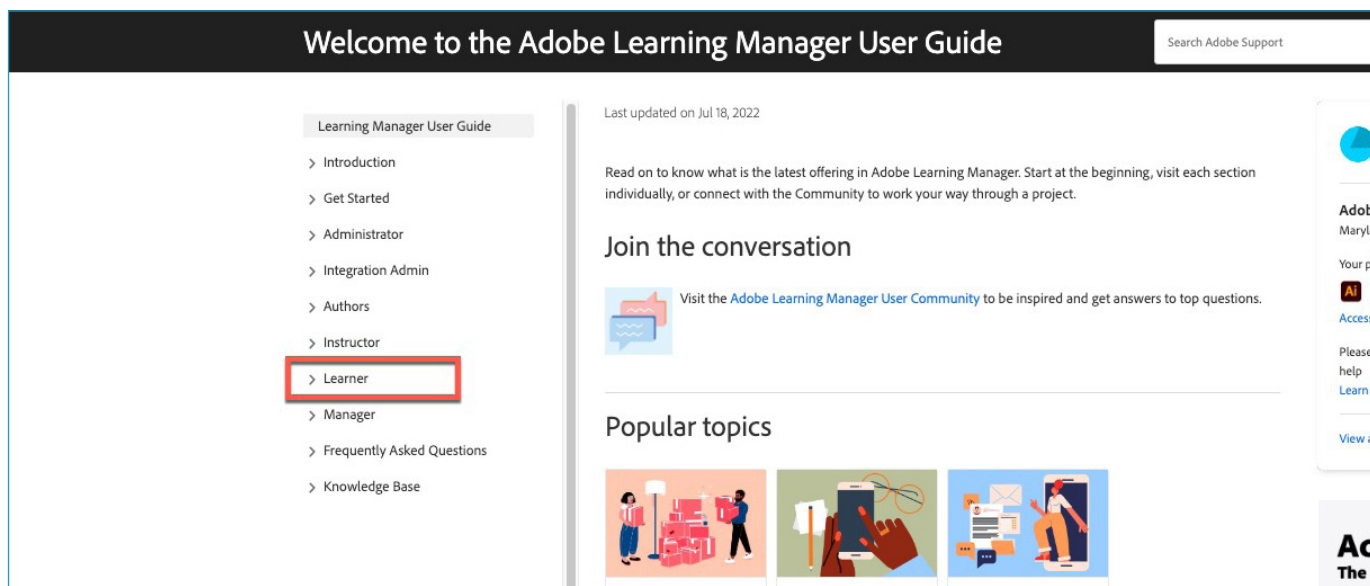
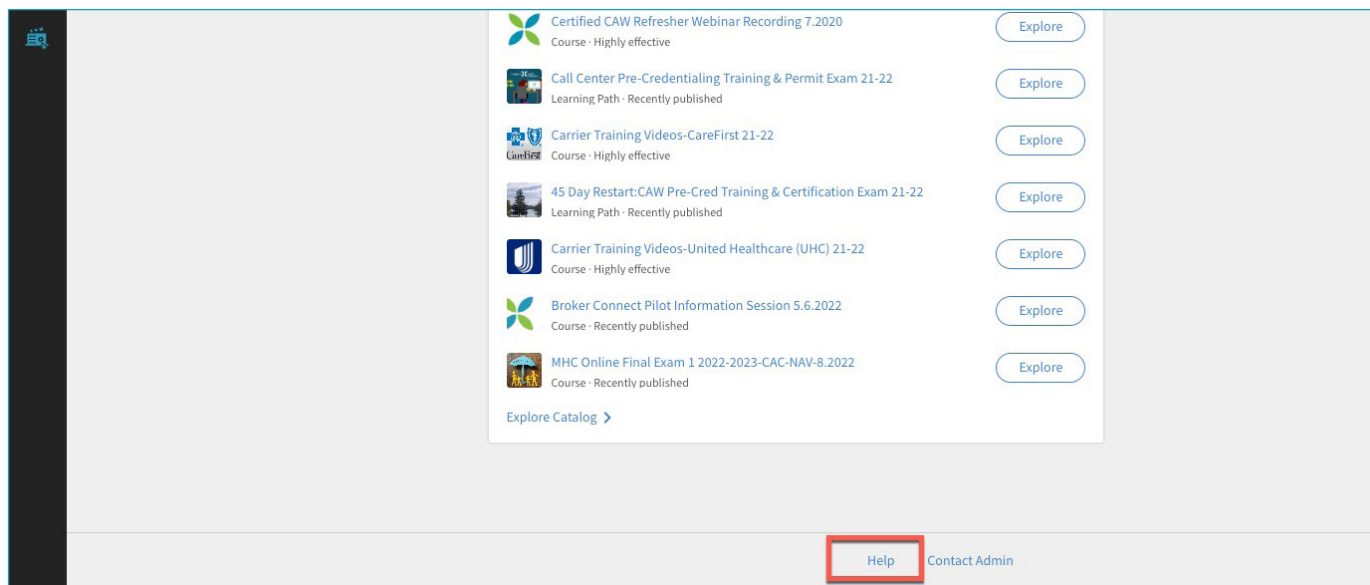
- 4 Also located at the bottom left of your player is the Table of Contents button.



Help Features

If you need help with any adobe function, clicking **Help** in the footer (down at the bottom) of the Learner Dashboard will route them to the ALM User Guide. This guide has helpful information on many aspects or the ALM experience, and can help you with many of your questions and concerns.

Choose Learner from the menu on the left side of the screen once you have arrived at the ALM User Guide to find more information.



*SHOULD YOU EXPERIENCE ANY DIFFICULTIES, ERRORS, OR OTHER ISSUES IN ANY STEP OF THIS TRAINING PROCESS, PLEASE CONTACT OUR MHBE TRAINING TEAM VIA EMAIL AT **MHC.TRAININGSUPPORT@MARYLAND.GOV***



TRAINING COMPLETION

After You Have Completed Training

Congratulations! You have now completed your required training!

If you are a returning broker: You should now be prepared to help your clients during the upcoming enrollment period.

If you are a new broker: Please refer to your initial authorization email for any other requirements that you must complete. If you have completed all of the requirements, you should expect to receive your authorization letter from us within a week. If you have not received your authorization letter from us within a week of completing all of the authorization requirements, please feel free to ask us for an update on when you will received your authorization letter.

You can email us at mhbe.producers@maryland.gov .

Once you receive your authorization letter, you should be all set to help your clients during the upcoming enrollment period.